Current Planning, Core Planning Values, Basis for Planning, Project Management & Plan Making and Leadership

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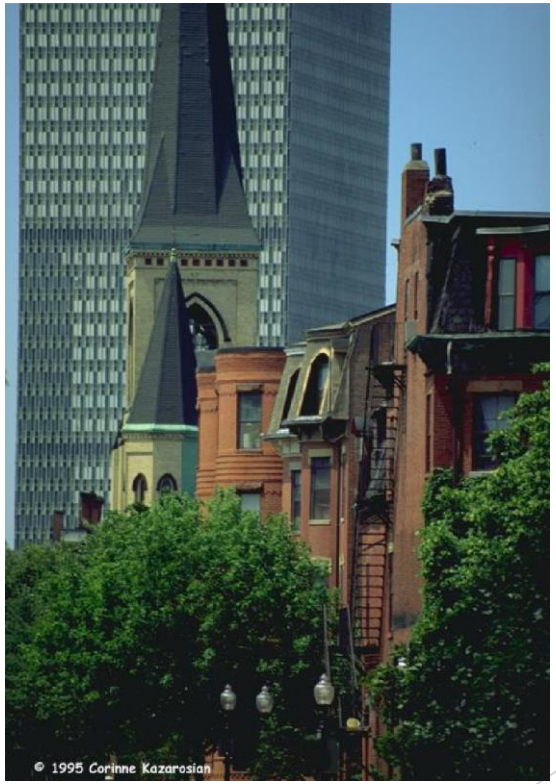
2026 AICP Exam
Areas of Practice
Current Planning

(and a little history too)

- This section will cover:
  - Zoning
  - Permitting
  - Site planning and design review

Zoning history

- Boston enacted a maximum height limitation of 125 feet applicable to the entire city designed to discourage skyscrapers. (1892)
- Copley Square height limit to 100’ in 1898.
- Different height limits enacted in 1904 for residential (75’) and commercial (125’).
- Upheld by SCOTUS in 1909 – Welch v. Swasey



Zoning history

- Encouraged by the Supreme Court's decision validating Boston's height regulations, New York City enacts the first comprehensive system of land use control in the United States in 1916
  - Three separate types of zoning districts
  - Use, height, and land coverage regulations

Definitive legal precedent for zoning

- Village of Euclid, OH v. Ambler Realty Co. 272 U.S. 365 (1926)
- Zoning relatively new concept at the time
- Upheld premise that there was a valid government interest in maintaining the character of a neighborhood and in regulating where certain land uses could be located

Standard State Zoning Enabling Act

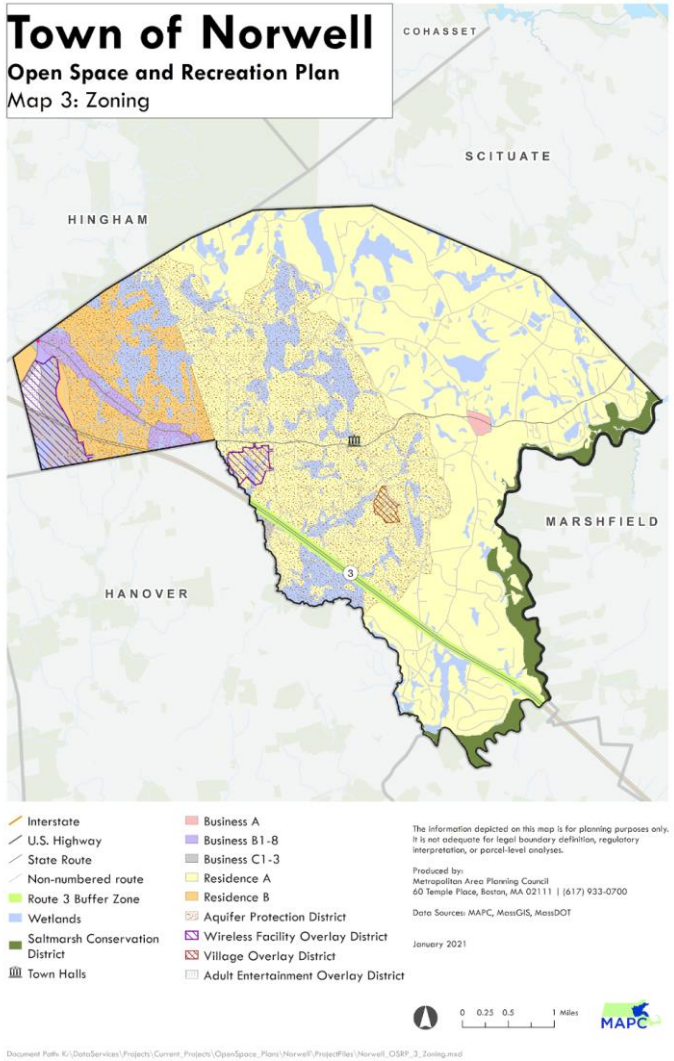
- Herbert Hoover, U. S. Secretary of Commerce, appoints Zoning Advisory Committee in 1921
- This model was the basis for zoning statutes in many states
- Included a grant of power, a provision that the legislative body could divide the local government's territory into districts, a statement of purpose for the zoning regulations, and procedures for establishing and amending the zoning regulations
- Presumed to be in accordance with a comprehensive plan

Definition of zoning

- “Ordinances and bylaws, adopted by cities and towns to regulate the use of land, buildings, and structures to the full extent of the independent constitutional powers of cities and towns to protect the health, safety, and general welfare of their present and future inhabitants”

Zoning districts

- Uniformity required (all similar properties are treated similarly)
- Zoning map required
- How uses are permitted
  - By Right
  - Special Permit
  - Variance
  - Site Plan Review



Euclidian (single use) Zoning

- Emphasizes use separation
- Encourages auto oriented development
- Is not pedestrian friendly
- Does not allow mixed use development
- Forces homogeneous development
- Inflexible prescriptive standards
- Weak tool for quality of design

Innovative Zoning

- Planned Unit Development
- Open Space Residential Design
- Performance based land use controls
- Incentive zoning
- Transferable Development Rights
- Overlay zoning districts
- Corridor management/design controls
- Mixed use development
- Transit orientated development
- Form-based zoning

Variances

- Dimensional variance
  - Most common
  - Addresses setbacks, lot coverage, etc.

- Use variance
  - Can allow uses that are not specifically permitted within a zoning district
  - Not a great planning tool since it subverts the zoning code
  - Essentially amounts to a zoning change without process

What are the three findings required to issue a variance?

- Finding #1: Uniqueness
  - Owing to circumstances relating to soil conditions, shape or topography of the land; or structure and especially affecting such land or structure but not generally affecting the zoning district in which it is located
- Finding # 2: Hardship
  - A literal enforcement of the provisions of the ordinance or bylaw would involve substantial hardship
- Finding # 3: Public Good
  - Desirable relief may be granted without substantial detriment to the public good and without nullifying or substantially derogating from the intent or purpose of the ordinance or bylaw

Special Exception Permits

- Sometimes referred to as conditional use, special permit, special exception
- Developed to add flexibility to rigid "single use" zoning schemes
- Regulates that middle tier of uses between those so offensive that they are prohibited and those so innocuous that they are allowed as of right
- Local ordinances or bylaws must provide adequate standards for guidance of the board to grant or withhold special permits

Special Permit decision

- Limited to criteria detailed in ordinance or bylaw
- Board may not refuse to issue permit for reasons unrelated to the standards of ordinance or bylaw
- Reasonable discretion
- Board may not base decision on reputation or character of applicant
- When a special permit application is accompanied by plans or specifications detailing the work to be undertaken, the plans and specifications become conditions of the issuance of the permit

Site Plan Review

- Establishes criteria for layout, scale, appearance, safety and environmental impacts of new or redevelopment.
- Attempts to “fit” projects into the community
- Focuses on parking, traffic, drainage, driveway construction, signage, utilities, screening, lighting and other aspects of a proposal to arrive at the best possible design for the location
- Used in conjunction with special permits and for projects not requiring a discretionary permit

Site plan process

- Review typically undertaken by Planning Board/Commission or administratively by planning staff
- Use or structure requires only a Building Permit
  - Process used to impose reasonable conditions before issuance
  - Site Plan Review attached to an as of right use cannot be used to deny the use

Powers of Site Plan Review Board

- Reject a site plan that fails to furnish adequate information required by the ordinance or bylaw
- Impose reasonable conditions in connection with site plan approval, even at the expense of the applicant
- Reject site plans where “although proper in form, (the site plan) may be so intrusive on the needs of the public in one regulated aspect or another that rejection by the board would be tenable.”

Core Planning Values

According to APA, what is a planner's "primary obligation"?

- To serve the public interest

- According to the APA, in the Code of Ethics, Section A: Principles to Which We Aspire
  - #1. Our Overall Responsibility to the Public

- Our primary obligation is to serve the public interest and we, therefore, owe our allegiance to a conscientiously attained concept of the public interest that is formulated through continuous and open debate.

Core Values

- Architecture: placemaking, urban design
- Engineering: infrastructure systems
- Public Health: Socio-economic conditions, equity, active living
- Landscape Architecture: environment, placemaking
- Sustainability: environment, economic, equity, resiliency
- Planning: all of the above??

Core Values

- Process
  - Multi-disciplinary
  - Iterative
  - Customer/public centered

Ethical Principles in Planning

- The planning process must continuously pursue and faithfully serve the public interest.
- Planning process participants continuously strive to achieve high standards of integrity and proficiency so that public respect for the planning process will be maintained.
- APA members who are practicing planners continuously pursue improvement in their planning competence as well as in the development of peers and aspiring planners. They recognize that enhancement of planning as a profession leads to greater public respect for the planning process and thus serves the public interest.

Basis for Planning

Statutory Basis for Planning

- Federal (not generally land use)
  - Constitutional and statutory limits
  - Transportation planning (through MPOs)
  - Funding requirements (e.g. CDBG Consolidated Plan)

Statutory Basis for Planning

- Land Ordinance of 1785
  - Northwest Territory allowed for the creation of Townships
  - Township were defined as a 6-mile by 6-mile square with a total of 36 one-acre sections
  - Initially Section 16 was reserved for public education and later Section 36 was added as being reserved for public education
  - This type of land development remained until the Homestead Act of 1862
  - The Land Ordinance established the Land Survey System used in the United States

Statutory Basis for Planning

- Dillon's Rule (1868) – a municipal government has authority to act only when:
  - Power is specifically granted by the state; or
  - Necessarily implied by the state or incident to the powers expressly granted; or
  - Otherwise implied as essential to carry out state charge

- "Municipal corporations owe their origin to, and derive their powers and rights wholly from, the legislature."

Statutory Basis for Planning

- Home Rule provides municipal authority unless:
  - Specifically banned by the state
  - State regulates and limits the activity
  - State covers the field

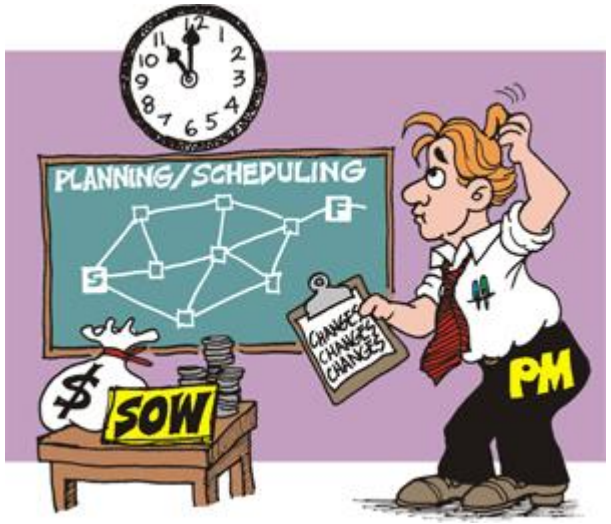
Statutory Basis for Planning

- Statewide planning
  - Comprehensive/master/general planning – mandatory in some states; state approval required in some states
  - Zoning: requirements for consistency with plan varies
  - Subdivisions; historic protection; wetlands, etc.
  - Eminent domain limits

Statutory Basis for Planning

- State issues not relevant to New England
  - Relationship to counties
  - Unincorporated land
  - Annexation
  - Pre-annexation regulations
  - Growth management (regional)/urban growth boundaries
  - School districts not part of municipalities

Project Management



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APA's "Project Management for Planners: A Practical Guide"

- A project manager should spend his/her time as follows:
  - Initiating – 5%
  - Planning - 35%
  - Executing – 25%
  - Controlling – 25%
  - Closing – 10%

Source: "Project Management for Planners: A Practical Guide", Terry Clark

What is Project Management?

- BusinessDictionary.com defines project management as "the body of knowledge concerned with principles, techniques, and tools used in planning, control, monitoring, and review of projects (WebFinance 2011).“
- Also managing people and expectations (realistic….or not)

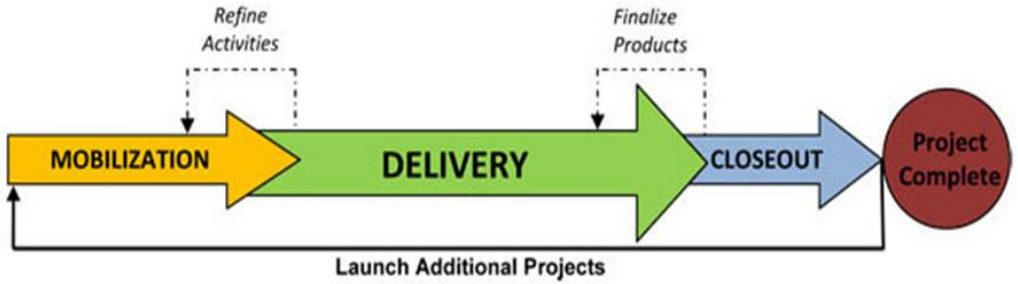
Why Does it Matter?

- Makes us better planners
- Timely outcomes and predictable results
- Ineffective management yields unfulfilled promises
- Planners tend to deal in uncertainties
- Goal should be to deliver project within the scope, on time, and on budget

Elements of Project Management

- Taking charge of the project
- How to work with a team
  - Internal and external team members
- Negotiations and communications
- Ultimate goal is to complete project on time and within the budget

Project Management 101



- Mobilization is shortest but arguably the most critical
- Delivery is the longest, most complex and requires the most resources
- Closeout also short but may be what determines success or failure of the project
  - Implementation of project is next step

Project Management Plan

- Project definition, scope, and assumptions
- Project goals and objectives
- Project organization and staffing
- Work program, including work breakdown structure
- Key decision points
- Risk assessment
- Schedule
- Budget
- Coordination and communications protocols
- Quality control and quality assurance program

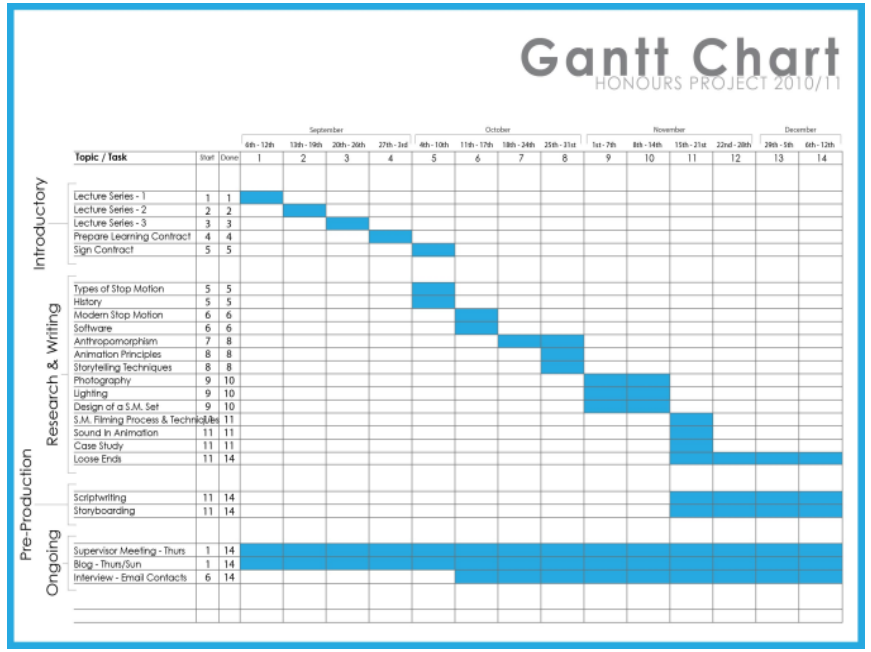
Project Management Tools

- Scoping
- PMP updates and revisions
- Team meetings
- Status reports
- Task and subtask breakdown
- Scheduling
- Budgeting
- QA/QC
- Revisions to scope, budget, schedule, etc. as needed

Scheduling Techniques and Time Management

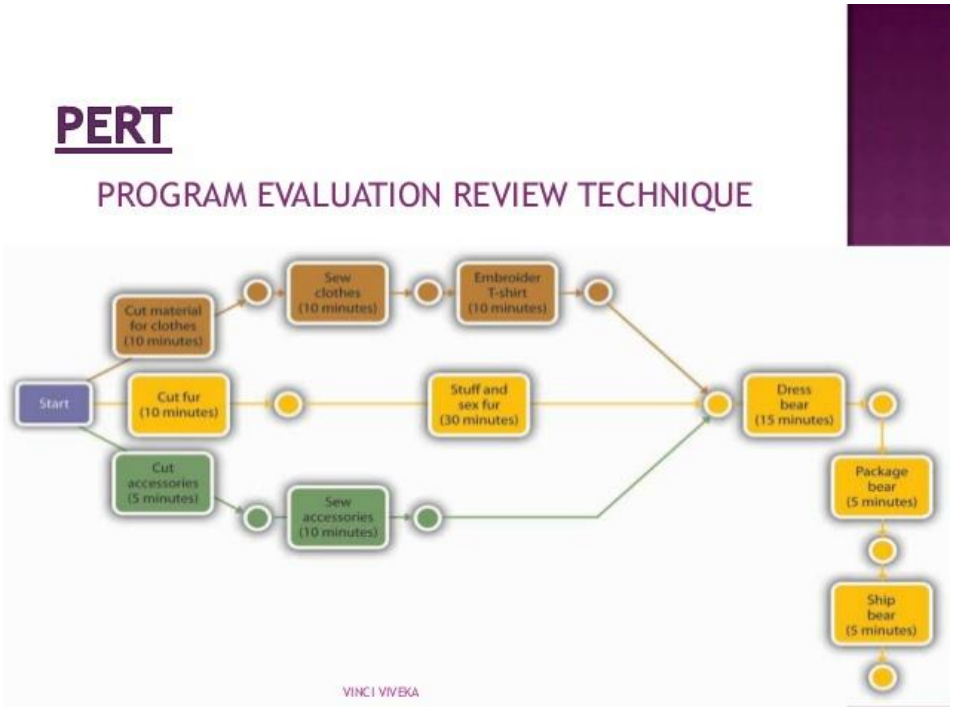
- Gantt Charts
- Program Evaluation Review Technique (PERT)
- Critical Path Method (CPM)
- Decision Matrix

Gantt Charts



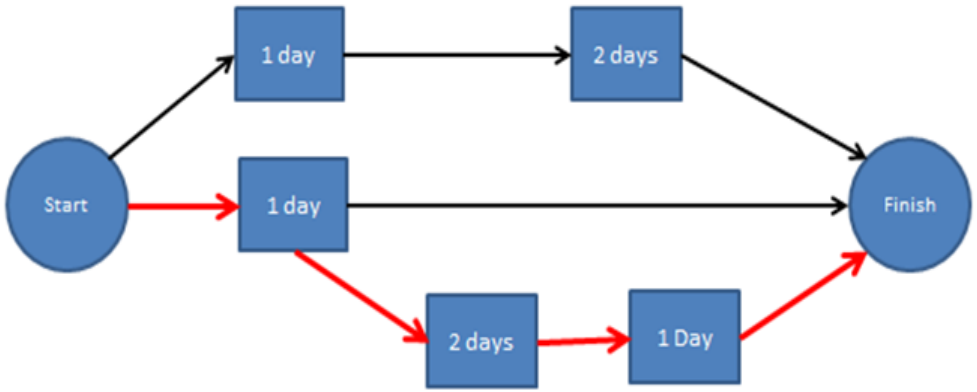
In a Gantt Chart, the various tasks involved in a project are listed on the y-axis, and the time period in which the project as a whole must be completed is depicted on the x-axis. The time period allotted to each individual task is represented as a horizontal bar. Thus, Gantt Charts organize and allocate time among these tasks.

Program Evaluation Review Technique (PERT)



A PERT system graphically depicts the relationships among a project's constituent tasks as links in a web. PERT systems are capable of reallocating the available resources (e.g. time, labor, materials, etc.) among these tasks (where feasible) to keep the project on-time and on-budget. A probability technique which involves estimations of the most optimistic, pessimistic, and realistic resource amounts needed to complete each task is used to identify the constraining relationships among the tasks that will dictate the resource requirements of the project as a whole.

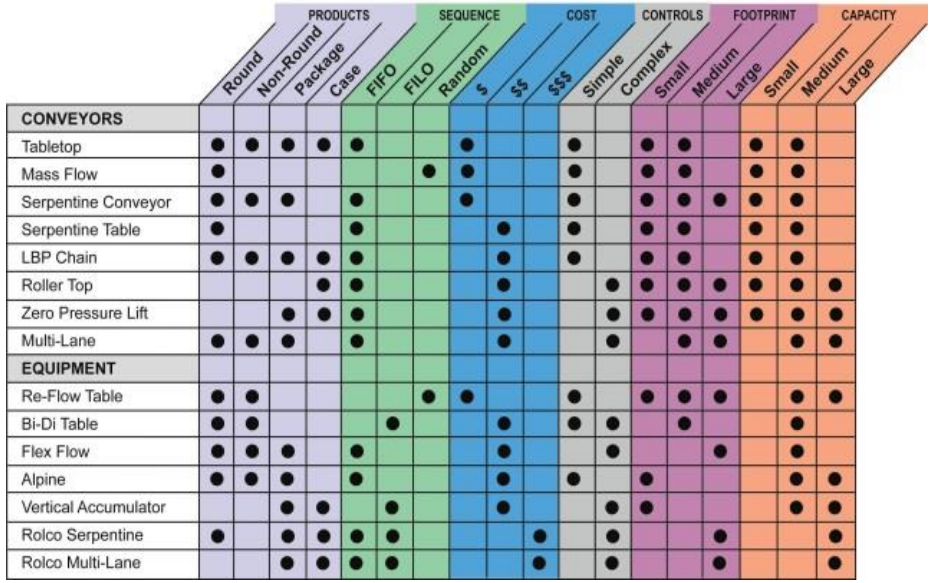
Critical Path Method (CPM)



Critical Path = 4 Days

CPM is used to determine the allocation of resources (e.g. time, labor, materials, etc.) among a project's constituent tasks that will complete the project using a minimal amount of each resource. CPM accomplishes this by estimating – for each task – a crash cost (finishing the task in a minimum amount of time by using unlimited labor and materials) and a crash time (finishing the task with minimum amounts of labor and materials by using an unlimited amount of time). CPM can be used within a PERT system.

Decision Matrix



	PRODUCTS				SEQUENCE			COST			CONTROLS		FOOTPRINT			CAPACITY		
	Round	Non-Round	Package	Case	FIFO	FILO	Random	$	$$	$$$	Simple	Complex	Small	Medium	Large	Small	Medium	Large
CONVEYORS																		
Tabletop	●	●	●	●	●			●			●		●	●		●	●	
Mass Flow	●						●	●			●		●	●		●	●	
Serpentine Conveyor	●	●	●		●			●			●		●	●	●	●	●	
Serpentine Table	●				●				●		●		●	●		●	●	
LBP Chain	●	●	●	●	●				●		●		●	●		●	●	
Roller Top				●	●				●			●	●	●	●	●	●	●
Zero Pressure Lift			●	●	●				●			●	●	●	●	●	●	●
Multi-Lane	●	●	●		●				●			●		●	●		●	●
EQUIPMENT																		
Re-Flow Table	●	●					●	●			●		●	●	●		●	●
Bi-Di Table	●	●				●			●		●	●		●			●	
Flex Flow	●	●	●		●				●			●			●		●	
Alpine	●	●	●		●				●		●		●				●	●
Vertical Accumulator			●	●		●			●			●	●				●	●
Rolco Serpentine	●		●	●	●	●				●		●			●			●
Rolco Multi-Lane			●	●	●	●				●		●			●			●

A decision matrix is a list of values in rows and columns that allows an analyst to systematically identify, analyze, and rate the performance of relationships between sets of values and information. Elements of a decision matrix show decisions based on certain decision criteria. The matrix is useful for looking at large masses of decision factors and assessing each factor's relative significance.

Plan Making

“We usually do our long-range planning at the last minute”

Jurisdictional Areas of Practice

- Planning at the national level
- Planning for multi-state regions
- State planning
- Planning at the regional level
- Planning at the county level
- Planning at the local level
  - Urban areas
  - Suburban
  - Small town/rural

Types of Planning

- Comprehensive planning
- Strategic planning (topic plans & area plans)
- Corridor planning
- Open space planning
- Neighborhood planning
- Waterfront planning
- Historic District planning
- Downtown planning

The Planning Process

- Basic goals
- Study and analysis
- Plan or policy preparation
- Implementation and effectuation
- Monitoring and feedback

Comprehensive Plans

- Each element of a comprehensive plan usually contains:
  - a description of existing conditions,
  - a statement of goals and objectives, and
  - a description of future needs and proposals for meeting those needs
- It is “comprehensive” in that it tries to link long-range objectives to a number of interdependent elements

What is a Comprehensive Plan?

- A future vision and policy guide for the Town
- Plan for a community's physical evolution
- Comprehensive analysis of all aspects of community development
- Long-range (typically varies from 10 to 15 years)
- NOT a zoning bylaw or regulation

A Comprehensive Plan Helps Communities:

- Manage growth and change
- Provide for orderly and predictable development
- Protect environmental resources
- Set priorities for developing and maintaining infrastructure and public facilities
- Strengthen local identity
- Create a framework for future policy decisions
- Promote open, democratic planning
- Provide guidance to landowners, developers, and permitting authorities

Comprehensive Plans

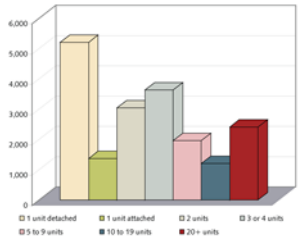
- Comprehensive Plans (a.k.a. “master” or “general” plans): A comprehensive plan’s geographic scope is usually an entire municipality, its “time scale” is usually long-term, and its elements usually address:
  - demographics
  - housing
  - economic development
  - transportation
  - land use
  - community facilities
  - public utilities, & infrastructure
  - environmental issues
  - recreation & open space
- Increasingly, comprehensive plans include such topics such as:
  - health
  - historic preservation
  - social issues
  - energy
  - sustainability
  - arts and culture

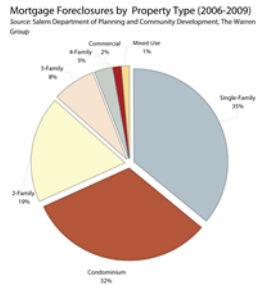
How Long Does It Take?

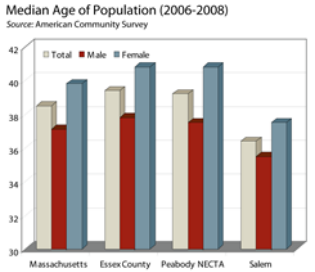
- Nine months to two years, depending on...
  - Local capacity
  - Who's in charge?
  - Public process
  - Community characteristics: size, make-up, complexity of land use pattern
  - Age and relevance of existing master plan
  - Degree of agreement or disagreement about major community issues
  - Catalysts for master plan process
  - Planning and zoning track record
  - Perceptions of local government
  - Form of government
  - Budget

Where Are We Today?

- Review and synthesis of past plans, studies, reports
  - Data Collection
  - Bureau of the Census
  - Regional planning agency
  - State agencies
  - Watershed associations
  - Assessor's office
  - Other local sources, e.g., library needs analysis, Council on Aging annual reports, school department statistics
  - Town clerk
  - Community organizations

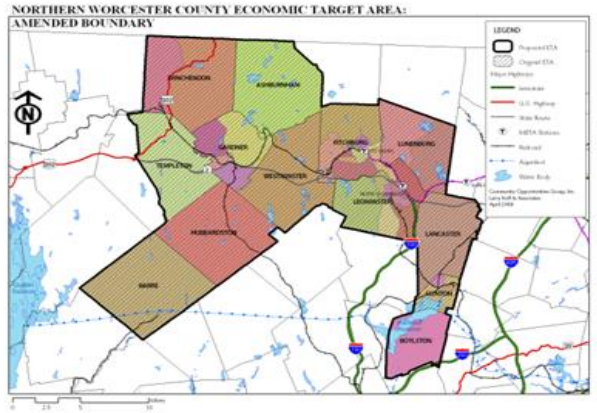


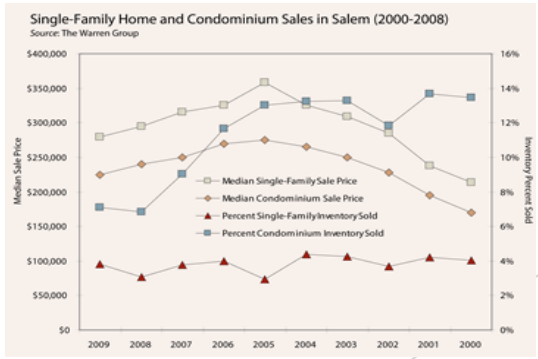




Planning Ahead

- Data analysis
  - Trends, estimates, predictions
- What do we need to change?
  - Opportunities and challenges
  - Analysis of options
  - Strategy consensus
- How do we get there?
  - Implementation plan
  - Implementation committee
  - “Early success” actions





Leadership

American Planning Association Leadership

- Board of Directors– 16 members serving 4-year terms
- AICP Commission- 11 members serving 4-year terms
- Chapter Presidents Council
- Divisions Council– 25 Divisions
- Student Representatives Council

- Delegates Assembly- For policy development

Leadership in Planning: Vision and Strategic Thinking

Anticipating Future Trends:

Leaders in urban planning must be able to anticipate future trends and challenges, such as climate change, population growth, and technological advancements, and incorporate these into their planning strategies.

Creating a Shared Vision:

Effective leaders inspire others to share in their ambitious, yet achievable, urban dreams, creating a sense of purpose and direction for the community.

Strategic Planning:

Leaders play a critical role in developing and implementing strategic plans that align with the organization's vision and goals.

Leadership in Planning: Collaboration and Stakeholder Management

Managing Diverse Stakeholders:

Urban planning is a collaborative field that requires effective leadership skills to manage diverse stakeholders, including residents, businesses, government agencies, and non-profit organizations.

Balancing Competing Interests:

Leaders must be able to balance competing interests and find common ground to achieve sustainable solutions.

Facilitating Communication:

Effective communication is essential for building trust and ensuring that the public is informed and involved in the planning process.

Leadership in Planning: Implementation and Execution

Leading Teams:

Leaders need to effectively manage and motivate teams of planners and other professionals to implement plans and projects successfully.

Managing Projects:

Leaders are responsible for overseeing the implementation of urban planning projects, ensuring that they are completed on time and within budget.

Monitoring and Evaluation:

Leaders must continuously monitor and evaluate the effectiveness of urban planning initiatives and make adjustments as needed.

Leadership in Planning: Political and Community Engagement

Influencing Political Leaders:

A key part of urban planning is convincing political leaders to support good planning ideas, which requires strong communication and leadership skills.

Engaging the Public:

Leaders must be able to effectively engage with the public and build consensus around planning proposals.

Advocating for Good Planning:

Leaders must be able to advocate for good planning practices and policies, even in the face of opposition.

Common Leadership Styles

Indeed' https://www.indeed.com/career-advice/career-development/10-common-leadership-styles

Autocratic leadership style

An autocratic leadership style focuses strongly on input and decision-making from the person in charge. There is usually a clear separation between the leader and employees, and the workplace is typically highly structured and rigid.

Autocratic leaders display traits like self-confidence, motivation and drive, clarity, consistency, and dependability.

Pros:

- Decision-making is quick and efficient as it is done by one person with limited outside discussion
- High-pressure or stressful situations are handled by strong and directive leadership
- A clear chain of command or oversight
- Relieves responsibility of complex decision-making from employees

Cons:

- Discourages team discussion and can often overlook others' perspectives
- Limits creativity
- Removes options for agency and collaboration
- Can lead to resentment from employees as they may not feel their contributions are appreciated

Bureaucratic leadership style

A bureaucratic leadership style is primarily characterized by hierarchy. Bureaucratic leadership clearly defines duties and responsibilities for each position, establishes a specific chain of command, and often has set rules and processes in place.

Bureaucratic leaders are detail-oriented, disciplined and organized, hard-working, and often passionate about their area of specialization.

Pros:

- Clear understanding of roles, rules, and regulations
- Eliminates confusion or ambiguity in day-to-day work
- Fair employee treatment
- Offers transparency of processes

Cons:

- Discourages creativity and innovation
- Inflexible and difficult to change
- Can create “traffic jams” as the decision-making process has to go through a set pathway
- Teams are typically siloed, limiting collaboration and communication

Coaching leadership style

A coaching leadership style takes a personalized approach to leadership. Someone with this style focuses on improving employees as individuals by focusing on their unique strengths and weaknesses. They invite feedback, communicate with team members, and enjoy establishing mentoring relationships.

Coaching leaders tend to be compassionate, encouraging, supportive, future-minded, and emotionally intelligent.

Pros:

- Close connections with colleagues and employees
- Open lines of communication
- A supportive work environment
- Encouragement to think freely

Cons:

- Significant time and energy investment
- Change can happen at a reduced pace
- Requires a compatible team fit (which is not always guaranteed)
- Lack of coaching skills

Democratic leadership style

The democratic leadership style emphasizes shared decision-making amongst team members. Each person is encouraged to participate and bring their unique talents and knowledge together.

Democratic leaders are highly team-oriented, flexible and adaptable, and communicative. They value cohesion and engagement and will often reward out-of-the-box thinking.

Pros:

- Team members tend to feel valued, with higher job satisfaction and commitment
- Cultivates a positive work environment
- Higher levels of engagement
- Built-in inclusivity, as every team member is expected to be equally involved

Cons:

- A slower decision-making process
- Lack of decisive action from leadership
- Can lead to inefficiency and confusion if not managed properly
- Inequality of outcome as not every option can be chosen

Laissez-faire leadership style

Laissez-faire translates to “let it happen,” which encapsulates this leadership style. Laissez-faire leadership is largely hands-off, allowing team members to work autonomously. Employees are expected to make their own decisions and solve problems without extensive oversight.

Laissez-faire leaders are comfortable taking accountability, good at delegating, and trust their teams to accomplish tasks day-to-day.

Pros:

- Encourages personal growth, confidence, and innovation
- Limits pressure on employees
- Collaborative decision-making amongst team members
- Employees feel empowered to work independently

Cons:

- Can lead to conflict without intervention from leadership
- Confusion about roles and responsibilities
- Potential lack of motivation and poor time management
- Employees may feel isolated

Pacesetter leadership style

Leaders who are pacesetters opt to lead by example. They value results and take initiative to pursue goals. They also tend to have high standards, seek challenges, and thrive under pressure.

Pros:

- Addresses issues quickly
- Achieves goals rapidly
- Values competency
- Leaders are highly involved and take on tasks alongside employees

Cons:

- Minimized trust can lead to micromanagement
- Can lead to employee stress
- Can reduce engagement due to lack of employee input
- Misalignment between leadership and employees

Servant leadership style

Servant leadership style prioritizes well being and harmony amongst team members. A servant leader values listening to others, empathy, and foresight, seeking to build community and resolve conflicts.

Pros:

- Encourages a shared vision
- Cultivates a supportive work environment
- Empowers employees to be their best selves
- Leaders can earn respect amongst their peers, colleagues, and employees

Cons:

- Can slow down the decision-making process, which is inefficient in high-stakes situations
- Leaders can overcommit their time and energy
- May require a significant culture shift if the workplace is not already familiar with this leadership style
- Moral standards may be individualized to the leader rather than reached by consensus

Visionary leadership style

Visionary leadership is all about having a long-term goal for the future and working toward that goal with others. Start-ups or large corporations are often headed by visionary leaders who have specific business outcomes in mind.

Visionary leaders are optimistic, strategic, forward-thinking, motivational, and capable of forming long-term plans.

Pros:

- Accomplishes target goals
- Inspires others, including employees and shareholders
- Offers clear pathways to achieve outcomes
- Strong communication with others

Cons:

- Details may get lost
- Passion for the goal may outweigh others' input
- Current issues may be overlooked in favor of pursuing the long-term goal
- Motivation may wane if the leader moves on

Questions???

Best of luck with the exam!